

MONTHLY ANALYSIS OF INDUSTRY EMPLOYMENT DATA
New Hampshire, July 2003
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NOTE: The Bureau of Labor Statistics (BLS) says, “For purposes of analysis, the BLS has further aggregated NAICS sectors into groupings called ‘Supersectors’. The Current Employment Statistics (CES) program will publish data for these supersectors as well as sectors and detailed industries. Also, the aggregations to Goods-Producing and Service-Providing industries will be retained. The CES program will continue to classify all publicly owned establishments in government.”

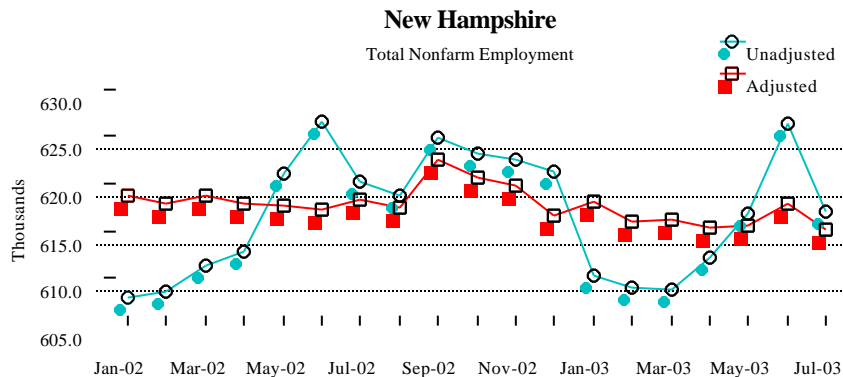
For more information on the CES conversion to NAICS, see our web site,
<http://www.nhes.state.nh.us/elmi/pdfzip/econanalys/articles/2002/NAICS.pdf>.

Seasonally Adjusted: Preliminary estimates in this category showed that New Hampshire’s total nonfarm employment fell by 2,600 jobs in July. Government (supersector 90) supplied 2,700 jobs to that total, while trade, transportation, and utilities (supersector 70) contributed 1,500 jobs to the downward trend.

Elsewhere, not all supersectors experienced diminished employment levels. Manufacturing (supersector 30) and construction (supersector 20) each expanded their ranks by 400 jobs, and leisure and hospitality added 300 jobs in July.

Unadjusted: School was out of session for the summer season, and manufacturing (supersector 30) took its traditional hiatus to have vacations and retool. Because of those events, total nonfarm employment overall dropped by 9,400 jobs in the preliminary unadjusted estimates for July.

Government (supersector 90) led the way with a 10,900-job reduction. Trade, transportation, and utilities (supersector 40), which has an affiliation with educational services, dropped 1,600 jobs. To complete the decline in the education arena, education and health services (supersector 65) in the private sector trimmed 800 jobs from their roster.



Manufacturing (supersector 30) had 1,200 fewer workers on the job in July, and information (supersector 50) cut its force by 200 jobs.

As the state moved deeper into the vacation season, leisure and hospitality (supersector 70) found it necessary to add 4,100 jobs in July.

Traditionally, July marks one of the high points in the construction industries’ (supersector 20) employment levels. With the 4,100-job increase in the July estimates, construction has again reached a high point for the year to date.

Two other supersectors added to their work force, but to a lesser extent. Employment in professional and business services (supersector 60) increased by 200 jobs, and natural resources and mining (supersector 10) brought 100 additional workers on board during the month of July.

Financial activities (supersector 55) and other services (supersector 80) sustained their June employment level into July.

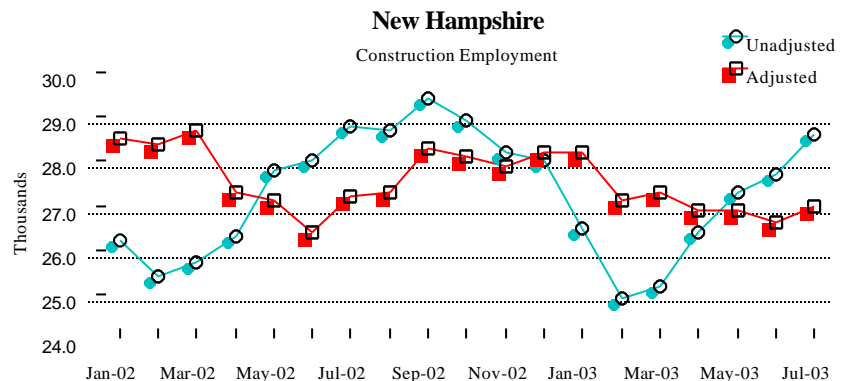
NATURAL RESOURCES AND MINING

Both parts of natural resources and mining (supersector 10) contributed to the 100-job growth in July estimates. The sample suggested that mining (subsector 212) exerted slightly more influence on the estimate than other elements in this supersector.

CONSTRUCTION

Employment in construction (supersector 20) grew by 900 jobs during the month of July. The sample showed that firms engaged in construction of buildings (subsector 236) had a large part in the month's employment increase, while specialty trade contractors (subsector 238) came in closely behind.

Further, according to the sample, heavy and civil engineering construction experienced a slight decline in employment totals.



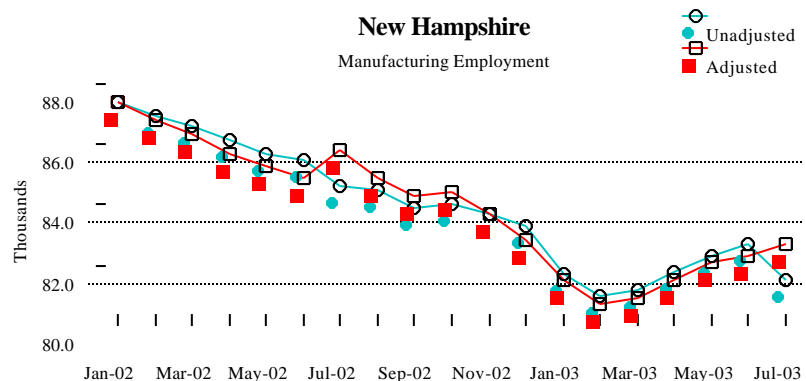
MANUFACTURING

As alluded to earlier, manufacturing employment typically declines in July. Historically, the practice was more pronounced in the transportation manufacturing industries, as foundries were shut down to retool production lines for the upcoming year's model. For the line workers, this practice provided vacation time. The face and nature of manufacturing have changed in many ways over the years, but for many firms, the tradition lives on.

Employment in durable goods manufacturing declined by 1,000 jobs in July's unadjusted estimates. Of the published industries in the durable goods manufacturing sector, primary metal manufacturing (subsector 331) dropped 200 jobs, and miscellaneous manufacturing (subsector 339) cut its roster by 100 jobs.

On the plus side of the ledger, computer and electronic product manufacturing (subsector 334) added 200 jobs. Within subsector 334, navigational, measuring, electromedical, and control instrument manufacturing (industry group 3345) supplied those 200 jobs.

The three remaining published industries' employment totals were unchanged in over the month activity.



Nondurable goods manufacturing employment fell by 200 jobs in July's preliminary estimates. The two published industries in nondurable goods manufacturing had paper manufacturing (subsector 322) dropping 100 jobs, while food manufacturing, and beverage and tobacco product manufacturing (a combination of NAICS subsectors 311 and 312) had 200 fewer workers on the job in July.

TRADE, TRANSPORTATION, AND UTILITIES

July's unadjusted estimates showed that employment in trade, transportation, and utilities (supersector 40) experienced shrinkage of 1,600 jobs. Wholesale trade (sector 41) maintained its employment at the June level. Retail trade (sector 42) employment declined by 1,000 jobs, and transportation, warehouse and utilities reduced employment by 600 jobs.

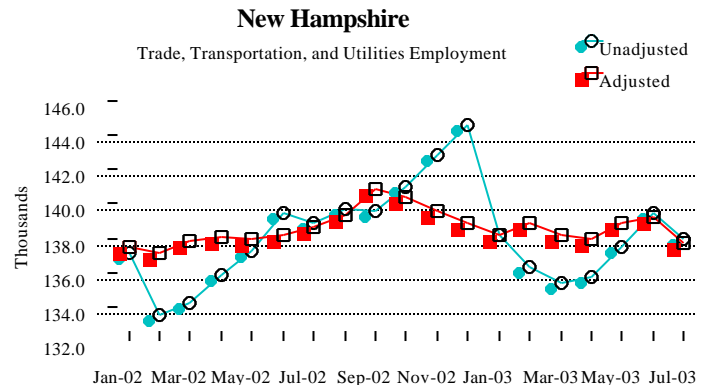
Retail trade's decline was led by food and beverage stores (subsector 445) with a 400-job cutback. Within those food and beverage stores estimates, grocery stores (industry group 4451) incurred a 500-job downturn.

Clothing, accessories, and general merchandise stores' (subsectors 448 and 452 combined) employment fell by 100 jobs; department stores (industry group 4521) accounted for that reduction.

Electronic shopping (industry group 4541) trimmed 200 jobs during the month.

In looking at previous years' retail trade trends, this July midseason adjustment was not uncommon.

The 600-job reduction in transportation, warehouse, and utilities could be traced to transportation, as employment in utilities remained unchanged in over-the-month activity. The sample indicated that firms involved in the transportation of students had a reduction in their work force.



INFORMATION

Information (supersector 50) pared back its labor force by 200 jobs in the July estimates. Firms that engaged in periodical publishing (industry 51112) made adjustments to their staffing levels according to the sample. It was interesting to note that employment in newspaper, periodical, book, and directory publishers (industry group 5111) had increased by 100 jobs in July.

PROFESSIONAL AND BUSINESS SERVICES

For the third consecutive month, professional and business services (supersector 60) experienced a modest increase in employment levels, as there were 200 additional workers on the job during July.

Administrative and support and waste management and remediation services (sector 56) added 300 jobs to its rolls, which provided the upward movement for the supersector.

Those gains were offset by a 100-job loss in the management of companies (sector 55).

Professional, scientific, and technical services (sector 54) held its employment at June's level.

EDUCATION AND HEALTH SERVICES

Seasonal influences had a significant impact on the July employment level in education and health services (supersector 65). Educational services (sector 61) accounted for 600 of the 800 fewer jobs in this supersector, with the completion of another school term. Of the 600 fewer jobs in educational services, colleges, universities, and professional schools (industry group 6113) chipped in 300.

Health care and social service (sector 62) saw its employment level decline by 200 jobs in July estimates. Inside the sector, ambulatory health care (subsector 621) dropped 200 jobs from its rolls, while hospitals (subsector 622) brought 200 additional workers on board. July's estimates further showed that nursing care facilities' (subsector 623) employment level was static during the month.

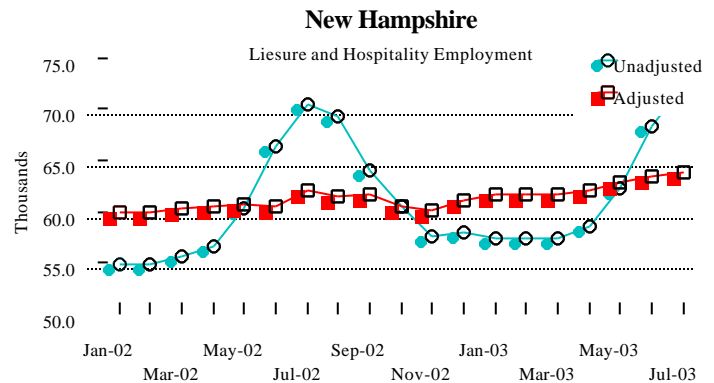
LEISURE AND HOSPITALITY

Leisure and hospitality (supersector 70) expanded its labor force by 4,100 jobs according to July's preliminary estimates. Accommodation and food services (sector 72) was the largest contributor to that increase with a 3,300-job addition. Arts, entertainment, and recreation (sector 71) added 800 jobs to its ranks.

Of the 800-job increase in sector 71, amusement, gambling, and recreation industries (subsector 713) accounted for 600 of those jobs. The sample pointed out that performing arts, spectator sports, and related industries (subsector 711) played a significant role in sector 71's increase.

Accommodation (subsector 721) supplied 2,600 of the 3,300 additional jobs in sector 72, while food service and drinking places (subsector 722) chipped in 700 jobs.

Full-service restaurants (industry group 7221) increased their staffs by 300 workers in the July estimates, and limited-service eating places (industry group 7222) added 200 jobs to their roster.



GOVERNMENT

Local government educational services were the primary driving force behind the 10,800-job reduction in government (supersector 90) employment. Elementary and secondary schools (industry group 6111) ranks contracted by 11,200 jobs. The public administration part of local government mitigated that reduction with a 900-job increase.

Federal government employment levels stayed the same as the previous month totals, but the postal service cut back its work force by 100 jobs.

State government employment declined by 500 jobs in the July preliminary estimates.

